

# Agency KPI Health Check

The Metrics That Matter for Marketing Agencies

Agency Manager  
by IdeaWeavers

Take this simple quiz to determine your Agency's KPI Maturity Score. The scoring key is available on page 2.

## SECTION A — Revenue & Margin Profile

### 1 Average Monthly Revenue Per Client

- a) Under \$3K
- b) \$3K-\$10K
- c) \$15K-25K
- d) \$25K+

### 2 Average Project or Retainer Margin

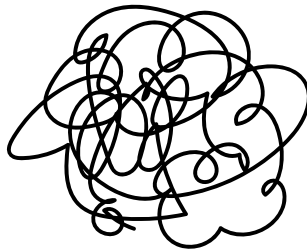
- a) Under 15%
- b) 15-25%
- c) 25-40%
- d) 40%+



## SECTION B — Metric Coverage

### 1 How many internal performance metrics does your agency actively review each month?

- a) Fewer than 5
- b) 5-10
- c) 11-20
- d) 20+



### 2 Which categories do you consistently track? (Check all that apply)

- Gross margin by client
- Utilization rate
- Billable vs non-billable time
- Client acquisition cost
- Client lifetime value
- Project delivery margin
- Forecasted revenue
- Capacity planning

## SECTION C — Reporting Tools

### 1 What tools do you rely on for reporting? (Check all that apply)

- Spreadsheets
- Project management software
- Time tracking tool
- BI dashboard
- PSA / agency operations platform



### 2 How integrated are these systems?

- a) Not integrated
- b) Partially Integrated
- c) Mostly Integrated
- d) Fully Integrated



## SECTION D — Reporting Rhythm

### 1 How often do leadership KPIs get reviewed?

- a) Ad hoc
- b) Quarterly
- c) Monthly
- d) Weekly

### 2 Who owns KPI reporting?

- a) No clear owner
- b) Finance only
- c) Ops Leader
- d) Leadership team



↓ CONTINUE FOR SCORING ↓



# QUIZ KEY



Add Up Your Score to Find Your KPI Maturity Level



## SECTION A — Revenue & Margin Profile

- |            |            |
|------------|------------|
| 1 a) = 1pt | 2 a) = 1pt |
| b) = 2pts  | b) = 2pts  |
| c) = 3pts  | c) = 3pts  |
| d) = 4pts  | d) = 4pts  |

## SECTION B — Metric Coverage

- |            |                     |
|------------|---------------------|
| 1 a) = 1pt | 2 0-2 checked = 1pt |
| b) = 2pts  | 3-4 checked = 2pts  |
| c) = 3pts  | 5-6 checked = 3pts  |
| d) = 4pts  | 7-8 checked = 4pts  |

## SECTION C — Reporting Tools

- |   |            |
|---|------------|
| 1 <b>Add up all checked boxes</b>       | 2 a) = 1pt |
| Spreadsheets = 1pt                      | b) = 2pts  |
| Project management software = 2pts      | c) = 3pts  |
| Time tracking tool = 3pts               | d) = 4pts  |
| BI dashboard = 3pts                     |            |
| PSA / agency operations platform = 4pts |            |

## SECTION D — Reporting Rhythm

- |            |            |
|------------|------------|
| 1 a) = 1pt | 2 a) = 1pt |
| b) = 2pts  | b) = 2pts  |
| c) = 3pts  | c) = 3pts  |
| d) = 4pts  | d) = 4pts  |



# YOUR SCORE ZONE

**Under 14**  
**REACTIVE**

Metrics are fragmented and backward-looking.

**15-21**  
**DEVELOPING**

Some core KPIs tracked, but insight is inconsistent.

**22-27**  
**OPTIMIZED**

KPIs drive decisions across teams.

**28-32**  
**PREDICTIVE**

Metrics fuel forecasting and proactive growth.

## What Your Score Means — and What to Do Next

Your KPI maturity score reflects how effectively your agency turns data into decisions.

- **Reactive (8–14):** Reporting is fragmented and backward-looking. Focus first on margin visibility and consistent leadership dashboards.
- **Developing (15–21):** Core metrics exist, but they’re not driving action yet. Standardize cadence and narrow to executive-ready KPIs.
- **Optimized (22–27): Strong fundamentals.** Shift toward forecasting, capacity modeling, and proactive client planning.
- **Predictive (28–32):** Elite operators. Use scenario modeling and automation to scale without margin erosion.

Start with the three metrics below that most directly improve profitability and delivery this quarter — then build outward.

### “The 3 Metrics You Must Fix This Quarter”

*Based on responses, surface three priority KPIs from the list below.*

#### Gross Margin by Client

**Why it matters:** Reveals which accounts fuel growth, and which quietly drain resources.

**Fix this quarter if:** Margins under 25% or not tracked monthly.

#### Utilization Rate

**Why it matters:** Indicates how effectively your team’s time is monetized.

**Fix this quarter if:** Under 70% or inconsistent between teams.

#### Project Delivery Margin

**Why it matters:** Shows whether work is scoped and executed profitably.

**Fix this quarter if:** You can’t calculate margin per project.

#### Forecasted vs Actual Revenue

**Why it matters:** Protects hiring, capacity planning, and cash flow.

**Fix this quarter if:** Forecast variance exceeds 10%.

#### Capacity Utilization by Role

**Why it matters:** Prevents burnout while highlighting unused billable hours.

**Fix this quarter if:** You staff reactively.

#### Client Acquisition Cost vs LTV

**Why it matters:** Keeps growth profitable.

**Fix this quarter if:** Sales ROI is unclear.

## Can’t Calculate These Metrics?

**When agencies hit growth ceilings, visibility into KPIs is usually a bottleneck.**

Agency Manager helps unify project data, financials, utilization, and forecasting into one executive dashboard, so leaders spend less time building reports and more time running the business.



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